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Arts for Delaware's Future Consortium

**Focus Group Findings:**  
Phase 3 Report

July 6, 2009



Audience research and planning for the mission-driven world.

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# Project Overview

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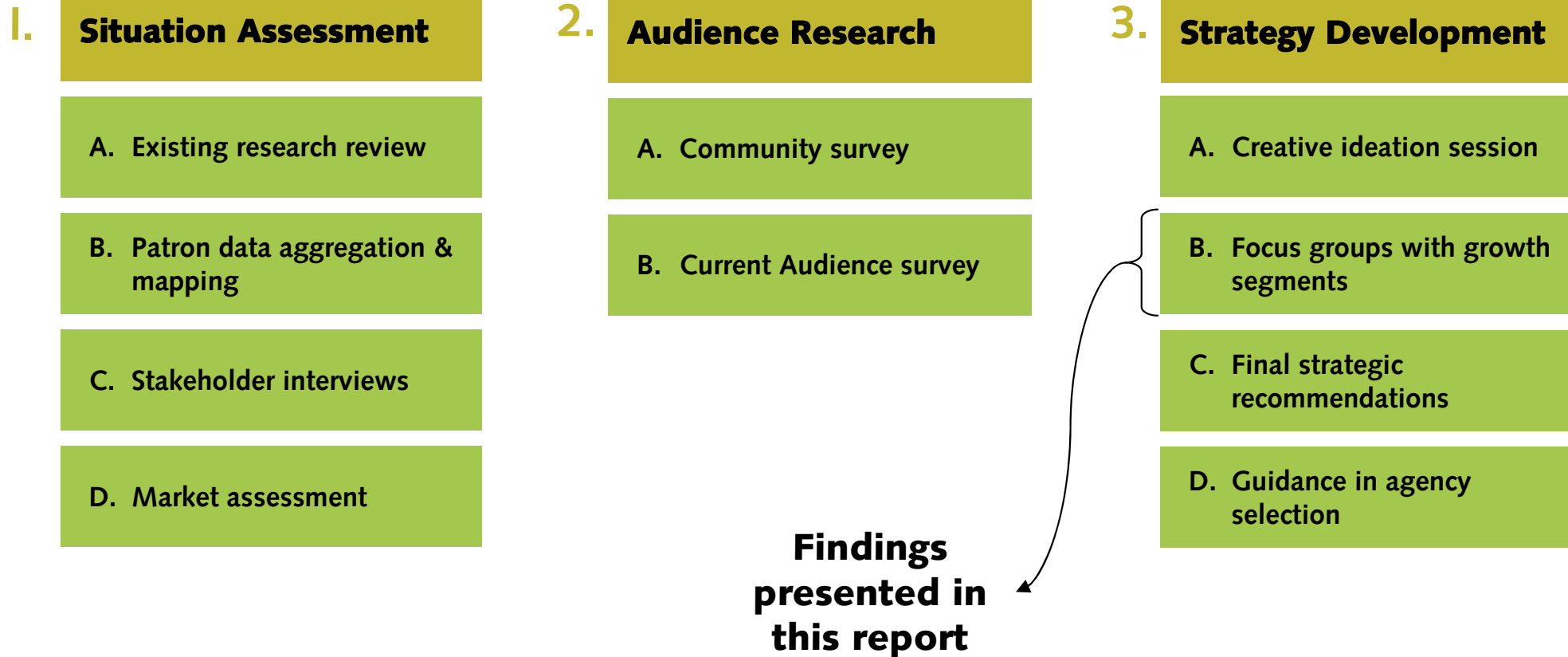
Project Background

Objectives

Methodology

# Project Background: Finalizing the third phase of a three-phase research approach to AFDF audience development

## Project Plan:



# Objectives: Key research questions shaped the approach and analysis for these focus groups

- These research questions about the region’s cultural consumers will be addressed in the sections that follow:

- What organizations are they currently attending?
- What are their current perceptions of Wilmington and Wilmington’s cultural landscape?
- How do they make decisions about attending cultural events?
- What are their reactions to specific strategies and tactics that AFDF organizations might use?
- What messages would entice them to attend or attend more?
- What messages can be used to talk about Wilmington’s cultural landscape?

**I.  
THE ARTS IN  
WILMINGTON**

**II.  
INCREASING AUDIENCE  
ENGAGEMENT &  
ATTENDANCE**

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## Methodology: Four focus groups among current AFDF patrons and non-patron cultural consumers

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- The groups were differentiated primarily by participants' recent attendance at AFDF organizations
  - One group of **crossover AFDF patrons**: patrons who have attended at least two AFDF organizations in the last 2 years
  - One group of **single organization AFDF patrons**: patrons who have attended only one AFDF organization in the last 2 years
  - One group of **heavy cultural consumer AFDF patrons**: patrons who attended at least one AFDF organization in the last 2 years and meet a high threshold of overall cultural attendance
    - Most heavy cultural consumer AFDF patrons were also crossover AFDF patrons
  - One group of **non-AFDF patrons**: patrons who have not attended any AFDF organization in the last 5 years
  - Participants in all groups attended or visited at least 3 cultural organizations in the last two years
  - All groups were recruited to also include a mix of ages, geographical residences, gender, incomes, and ethnicities
    - See recruitment screener in Appendix for full set of qualifications
- The focus groups were recruited by and held in a professional focus group facility in downtown Wilmington
  - Respondents were recruited from the aggregated patron database assembled in Phase 1 research, as well as the facility's own list (for non-members)
- The groups were held May 19<sup>th</sup> and May 20<sup>th</sup>
  - Each group lasted two hours and consisted of 8 respondents for a total of 32 people

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## Key Findings: **The Arts in Wilmington**

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### **Cultural activity profile**

Perceptions of Wilmington arts

Cultural decision making

## Cultural Activity Profile: Two distinct cultural activity profiles emerged

- The single organization AFDF patrons and non-AFDF patrons both tend to be **lighter cultural consumers** in general
  - In other words, they have fewer cultural experiences overall – not only fewer experiences at the five AFDF organizations
    - Most had attended 3-5 cultural organizations within the last 2 years
      - > In order to be included in the groups, all had to have attended a minimum of 3 organizations in the last 2 years
  - The organizations that they attend encapsulate a broader definition of “culture”
    - Including pop music concerts, ethnic cultural festivals, and sporting events
  - Their cultural activity takes place across a broader geographic region, with less attendance within Wilmington proper
- Meanwhile, patrons from both the AFDF crossover group and the heavy cultural consumer AFDF group tend to be **heavy cultural consumers** in general
  - Most had attended 6-9 different cultural organizations within the last 2 years
    - In order to be included in the groups, crossover AFDF patrons had to have attended a minimum of 3 organizations in the last 2 years and the heavy cultural consumer AFDF patron had to have attended a minimum of 5 organizations in the last 2 years
  - Their activity profile is not limited to a particular art form; instead, they attend a variety of organizations, from museums to theaters to classical music and opera venues
    - They also participate in culture broadly, but their arts experiences are more concentrated in traditionally “high” art forms than are those of lighter cultural consumers
  - While they do travel to Philadelphia and beyond for the arts, they also attend quite a bit within Wilmington itself
- This was also found to be true independent of participants’ level of AFDF activity

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## Cultural Activity Profile: Lighter and heavier cultural consumers select their activities from distinct menus

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- Heavier cultural consumers' cultural activity is centered on the performing arts and museums
  - Although they engage in a wide variety of culture and leisure activities, they really focus on the traditional “high” arts when discussing their attendance history
- For lighter cultural consumers, their definition of culture is not as centered on these types of institutions
  - This was true even of the single organization AFDF patrons, despite the fact that all had recently attended one of the five AFDF organizations
  - The area's many historic homes and gardens (e.g. Winterthur and Longwood) are central to lighter cultural consumers' cultural activity profile
    - All had been to at least one of the two in the last two years
      - > *“I like to visit the historic houses of the Victorian era. I do really enjoy visiting old time houses, hearing the history and seeing the history.” (Female, Non-AFDF patron)*
    - It should be noted, however, that Winterthur and Longwood Gardens are a top cultural draw for both types of consumers
      - > This is consistent with the Phase 2 quantitative research, which showed Winterthur and Longwood as the most commonly attended cultural institutions among both AFDF patrons and the area's cultural consumer population more generally
  - Ethnic cultural festivals (e.g. the Italian Festival) and pop concert halls/arenas also fall within the same activity choice set as the AFDF organizations for lighter cultural consumers
  - As we will discuss throughout the report, this broader definition of culture influences lighter cultural consumers' decision-making process, as well as the tactics and messages that are likely to be most effective at increasing their engagement with AFDF organizations

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## Cultural Activity Profile: For both types of consumers, the competitive set is geographically broad

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- Wilmington-area cultural consumers' choice set extends to Philadelphia, as well as D.C., New York, and Baltimore
  - Philadelphia, in particular, is a common cultural destination for the area's residents
    - Many Philadelphia institutions popped up on participants' lists of recently attended organizations as well as in their discussion of favorite institutions, including:
      - > The Kimmel Center/Philadelphia Orchestra
      - > Philadelphia Museum of Art
      - > Franklin Institute
      - > Please Touch Museum
    - But, institutions in D.C., New York, and Baltimore were also mentioned
      - > Smithsonian Institution in D.C.
      - > National Aquarium in Baltimore
      - > Broadway theaters in NYC
- Because these other cities are so easily accessible, Wilmington's performing arts and museum offerings compete directly with those in Philadelphia, D.C., and New York
  - For many lighter cultural consumers, the cultural offerings in these other cities are more top-of-mind than Wilmington's own organizations
    - *"I have not done opera here, I've done it in Philadelphia. The symphony I've done in Philly, but I've done other things here, not necessarily in the last six or seven years."* (Female, Non-AFDF patron)
    - *"I'll go to Philadelphia at the drop of a hat."* (Female, Single organization AFDF patron)
  - Even those who tend to prefer attending Wilmington's culture rather than traveling elsewhere still put other cities' offerings in their consideration set

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## Key Findings: **The Arts in Wilmington**

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Cultural activity profile

 **Perceptions of Wilmington arts**

Cultural decision making

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## Perceptions of Wilmington Arts: Consumers' conception of "Wilmington arts" is not limited by Wilmington's borders

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- Wilmington-area cultural consumers' cultural landscape encompasses far more than what's in Wilmington
  - Because many are inclined to attend cultural events outside of Wilmington, their perceptions of the cultural landscape around them extends to the Brandywine Valley and Philadelphia, as well as (to a lesser extent) New York, D.C., and Baltimore
- For the consumers, this is a good thing
  - One of Wilmington's assets is its proximity to many other – and bigger – cities, as well as the Brandywine Valley region spanning Delaware and Pennsylvania
    - *"We're in an area within an hour and a half or so, you can get to DC and New York and Philly and beaches, anything that's here. So geographically I think we're in a good spot in the country."* (Male, Non-AFDF patron)
    - *"There's a lot here in the general area ... but our close proximity to other urban areas where they have a greater breadth of opportunities, it's close enough that you can explore."* (Female, Crossover AFDF patron)
    - *"We're hoping to enjoy the arts more in the Brandywine Valley and we enjoy just about everything they have to offer there."* (Female, Single organization AFDF patron)
- But, it does challenge Wilmington's ability to develop its own identity as a cultural center
  - Philadelphia's identity as a cultural center is strong and Wilmington has yet to successfully differentiate its cultural brand
    - *"Do you really think that Wilmington has its own identity or does it play off of Philadelphia?"* (Male, Non-AFDF patron)

## Perceptions of Wilmington Arts: Few think of Wilmington arts as a cohesive “scene”

- It was not natural or easy for them to think about Wilmington arts in a holistic manner; to most, the arts in Wilmington are not more than the sum of their parts
  - In a projective exercise designed to elicit perceptions of the Wilmington’s arts and cultural life, we asked participants to select photographs that reminded them of some aspect of Wilmington’s arts scene
  - Instead, participants often defaulted to selecting a photograph that reminded them of a particular cultural institution in the Wilmington area
    - “This reminded me of Winterthur and floral beauty which I think that is a magnificent place to go see it .” (Male, Crossover AFDF patron)
- This was more prominent among lighter cultural consumers, whose experiences within Wilmington arts are more limited, but to some degree was shared by all respondents
  - Their perceptions of the Wilmington arts scene are frequently grounded in their experiences with an individual organization or two
  - But, even those with more cultural experience in Wilmington had a difficult time articulating what could be said about the arts landscape *as a whole*
- But, they do have perceptions of *Wilmington* as a whole and many apply those perceptions to the arts
  - Because Wilmington – particularly the downtown area – is seen as having limited options for leisure time activity, it was assumed by some that there is not much going on with the arts
  - Many also tie Wilmington’s industrial history to the arts – a sentiment which is strengthened by the association between DuPont sponsorship and the arts
    - “Some of the cultural arts here are rooted in its history for sure. The industrial history, we’re DuPont.” (Female, Single organization AFDF patron)
    - “From what I know and what I’ve observed, all the cultural things in Wilmington were originated by the DuPont family. “ (Female, Crossover AFDF patron)

## Perceptions of Wilmington Arts: Overall, however, the arts in Wilmington are perceived to be of high quality

- There is a general sense that Wilmington’s cultural organizations produce and present high quality art
  - To some extent, participants focused on Wilmington’s quality *given its size*, suggesting that they simply don’t expect it to match Philadelphia or New York
    - “I don’t think ... everything is completely equal to Philly or New York, but certainly a majority of stuff is on a professional level. You can have high-quality and artistic technical and on-stage talent.” (Male, Heavy cultural consumer AFDF patron)
  - But, some did speak of Wilmington’s quality in absolute terms
    - This was particularly true of heavier cultural consumers who have the range and depth of cultural experience to appreciate just how good Wilmington’s offerings are
      - > “I’ve seen about five productions of Don Giovanni, and I still think the best one I ever saw was the OperaDelaware about 15 years ago.” (Male, Crossover AFDF patron)
      - > “We’ve been to other places and seen other things so that we can compare. The stuff that you see at the DuPont Theater is really, really good; OperaDelaware can put on a really good show.” (Male, Crossover AFDF patron)
- Where Wilmington falls short – particularly for lighter cultural consumers – is in its ability to attract “big name” talent or marquee programming
  - For these lighter consumers, high-quality cultural offerings are synonymous with well-known artists or acts, and the perception is that Wilmington doesn’t draw these bigger names
  - Comparisons to Philadelphia and other nearby major metropolitan areas are especially unfavorable to Wilmington on this dimension
    - “Philadelphia gets Cezanne...they’ll bring things in there that are big! They don’t do it here.” (Male, Single organization AFDF patron)
    - “I think obviously Philadelphia with its size and stuff has the ability to draw larger, bigger acts.” (Female, Crossover AFDF patron)
    - “The big names tend to be in Philadelphia.” (Female, Non-AFDF patron)

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## Perceptions of Wilmington Arts: Wilmington is also thought to offer a wide variety of arts and cultural activities

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- Participants also spoke highly of the degree of variety in Wilmington’s cultural offerings
  - That Wilmington has a broad range of cultural activities to offer was mentioned by both heavy and light cultural consumers
    - *“There is so much in this area that you can choose from. If you're like me and you like the visual arts, there's a lot to do; if you like nature there's Winterthur, there's Longwood Gardens and some other public parks that you can choose from. If you like plays – oh my gosh – so many places that you can see a play. I just feel like there's so much to choose from here.” (Female, Heavy cultural consumer AFDF patron)*
    - *“You can go walk in a garden, you can go to a museum and look at art, you can go and listen to music, you can go and see a play, you can do the symphony, you can do opera, I mean, there's so many different things Wilmington has to offer – if you want to do it.” (Female, Non-AFDF patron)*
  - But again, many tended to qualify the degree of variety that can be found in Wilmington, speaking of how much variety there is for a town of Wilmington’s size
    - *“This town has a lot more to offer than you ever expect in a town of this size. This is not a big city and you're in the middle of a real cultural arts center, which I don't think most – maybe not most but a lot of people – appreciate.” (Male, Crossover AFDF patron)*
    - *“We've got what we've got and it's not bad, you know? We do have good symphony, good opera, I do think that we have a reasonable variety for a small town. We're not Boston, we're not New York, we're not San Francisco.” (Female, Single organization AFDF patron)*

## Perceptions of Wilmington Arts: Wilmington's cultural offerings are thought to be fairly conservative and "Euro-centric"

- There is a clear perception that, although Wilmington's arts institutions do what they do well, they do not attempt to be "modern" or "innovative" purveyors of art
  - Not all consider this to necessarily be a bad thing, but there is a distinct sense that the arts in Wilmington are conservative
    - *"My general evaluation of the art scene in the Wilmington area is it's very, very conservative and usually one or two steps back from what would have been considered modern when they were young. So it's maybe now six or seven steps back from modern, what is now considered modern."* (Male, Crossover AFDF patron)
    - *"And a lot of the places are ... I don't want to say old, but I wouldn't say current as far as the contemporary arts."* (Female, Non-AFDF patron)
  - A few respondents did express a preference and desire for Wilmington to offer less conservative arts experiences
- Participants also perceived a lack of ethnic or cultural diversity in the Wilmington arts scene
  - The cultural offerings themselves present a limited, Eurocentric world view
    - *"It's still mostly Eurocentric in most of their offerings. There's not a lot of focus on other cultures and so forth as much as the concentration from the Eurocentric perspective."* (Female, Crossover AFDF patron)
  - And, the lack of diversity in offerings limits the appeal of Wilmington's arts scene to Wilmington's large non-white populations
    - *"I teach 120 18-year-old students, residents of Wilmington, that will be graduated in nine days and there is nothing for them to do that they can relate to. They are not going to be walking around the Wilmington flower market; they're not going to be seeing the 10 Tenors; they need something that they can relate to.... Let's face it, the Hispanic culture is huge – Brandywine school district is projecting that by 2012 or something 68% will be speaking Spanish. We have a lot of minorities in Wilmington and you don't have any minorities walking around Longwood."* (Female, Non-AFDF patron)

## Perceptions of Wilmington Arts: Many appreciate the intimacy of Wilmington's arts scene

- This is one area in which Wilmington distinguishes itself from bigger cities like Philadelphia and New York – and largely in favorable ways
  - Cultural consumers appreciate the relatively small scale of cultural offerings in Wilmington; they feel it makes the experience more enjoyable and personal than larger-scale cultural events
    - *“It’s never really overly crowded and you can go and talk to the artist. It’s more approachable and they are local people, it gives you a chance to converse and you’ll see them somewhere else so – small is not necessarily a detriment.” (Male, Crossover AFDF patron)*
    - *“[The Grand] is not so overwhelming, whoever performs there you feel you’re right in the middle of what’s going on. It’s not like the stadiums up in Philadelphia where you’re a mile and a half away from the stage. You’re close to what’s going on there.” (Male, Non-AFDF patron)*
  - For people who live in the area, the smaller scale also translates into a more convenient and more affordable outing
    - *“What is here is of good quality, and it’s a whole lot easier to go to a show here and it’s cheaper, it’s more convenient...it’s a whole lot easier.” (Female, Crossover AFDF patron)*
- Many recognized that the intimate, small-scale nature of Wilmington's arts is something that they like about living in Wilmington in general
  - There's a “know your politicians” mindset that is appealing to – and a source of pride for – many Wilmingtonians
    - *“I would like to express it [the intimate nature of our arts scene] in terms of our association with politicians. For better or for worse, they’re always around and you can touch them. Joe Biden, he wasn’t living sitting on a pedestal; I met Joe Biden about 37 times before he ever ran for vice president; I felt like I knew him. And I know a lot of people who feel that way about the politicians, it’s unusual. They’re very accessible.” (Male, Crossover AFDF patron)*

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## Perceptions of Wilmington Arts: But, downstate residents do not appreciate the intimacy of the scene as strongly

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- For those who do not live in Wilmington (or who had never lived in Wilmington), Wilmington can seem confusing to navigate
  - *“A lot of times I'm intimidated about coming up here just because we don't know our way around” (Female, Non-AFDF patron)*
- Wilmington – the downtown area in particular – also seems dangerous to those who don't live there
  - There is a distinct concern that downtown Wilmington is not a safe place to be, particularly at night after a performance
  - This perception is re-enforced by coverage of Wilmington in downstate media outlets
    - News about crime is primarily what downstate residents hear about downtown Wilmington
- Together, these perceptions limit their ability to see Wilmington's arts scene as convenient and accessible

## Perceptions of Wilmington Arts: There's a sense that the arts scene itself is a secret to many in the area

- The down side of the small-scale nature of Wilmington's arts offerings is that cultural offerings can easily go unnoticed, even by local residents
  - Cultural consumers feel that the general public would be surprised to learn about how many cultural opportunities the Wilmington area has – and how good they are
    - *"I've heard it said the only difference between Wilmington and yogurt is that yogurt has living, active culture. I came to Wilmington's defense because I've been to the opera, I've been to the DuPont Theater..." (Male, Single organization AFDF patron)*
  - But, even active culture-goers feel like they themselves don't know the full extent of what Wilmington has to offer
    - *"There's stuff out there that I don't even know about." (Male, Crossover AFDF patron)*
    - *"I used to think that I could find what was going on and find what my family would enjoy, but apparently [after participating in this group] there's a lot more than I realized. I used to think I could find stuff pretty well but apparently there's a whole lot more." (Male, Single organization AFDF patron)*
- There was general agreement that Wilmington's arts organizations bear some responsibility for the Wilmington arts scene being a secret
  - They believe that Wilmington-area organizations aren't doing enough to disseminate information about their own events and offerings
    - *"I don't see any advertisements for a lot of this stuff jumping out at me, to reel me in. I don't see that in Wilmington." (Female, Non-AFDF patron)*
    - *"It's kind of hard to identify where these places are, what's going on with them, what I can take my family to. Most people aren't aware of the events going on." (Male, Single organization AFDF patron)*
  - That arts organizations are not collaborating in their communications and information-dissemination strategies is partly to blame for this
    - There is no cohesive communication about the Wilmington arts scene and patrons notice its absence

## Perceptions of Wilmington Arts: Some are concerned that the Wilmington arts scene is struggling

- Despite positive perceptions of quality and variety in Wilmington’s arts offerings, there is little sense that this has translated into a robust cultural life for the area
  - The concern is particularly palpable among heavier cultural consumers
    - *“I’m concerned that the arts are grinding to a halt.” (Male, Heavy cultural consumer AFDF patron)*
  - These problems aren’t new, but the current economic downturn isn’t helping
    - *“Some are intact, some are broken, and that’s how I see the arts in Delaware. Some are still going pretty strong but there are a lot of problems and I get a lot of letters from all the different organizations...and some things have been reduced in price. You know when that happens that they’re trying to draw a crowd because they need the money.” (Female, Heavy cultural consumer AFDF patron)*
  - And, many recognize that collaboration is a necessary ingredient in surviving the recession
    - *“More than ever organizations are going to be partnering, whether they want to or not I think they’re going to find that it is a lot more beneficial, and already organizations are starting to feel that they can pull in most of their mailing lists, and can get a lot more people than they could before.” (Female, Heavy cultural consumer AFDF patron)*
- Cultural consumers understand that a thriving arts scene requires a thriving city – particularly a vibrant downtown that can support and augment cultural experiences
  - Many felt that the problems facing the arts in Wilmington would require a revitalized downtown, with a richer street life, more restaurants and bars, and a better reputation on safety
    - *“When you come out of the Grand Hall after a concert, you come out to an empty street. There is nobody around.... If they want to revitalize the arts, they’re going to have to do something about keeping people downtown. ” (Male, Crossover AFDF patron)*
  - The recession has been a stumbling block for downtown revitalization efforts, and some recognize that revitalization isn’t happening as quickly as they would like
    - *“It seems as though there was a good, strong push for revitalization to kind of stop people from going to Philly or Baltimore and everything and keep people close to home but it doesn’t seem to have worked out the way that everyone would have liked.” (Female, Non-AFDF patron)*

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## Key Findings: **The Arts in Wilmington**

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Cultural activity profile

Perceptions of Wilmington arts

 **Cultural decision making**

# Cultural Decision Making: Consumers select events that they expect will provide four key benefits

- We identified four primary reasons that cultural consumers seek cultural experiences
  - Most believe that any type of arts experience is capable of providing these things
    - *“I wrote down enrichment. When you visit a museum or a gallery and you take the time to get involved in a display and read, it’s one of the best ways to learn things, depending upon the quality of the museum of course. But the same thing is true if you go see a quartet live or something, it’s just the best way of learning, it’s the pure source.” (Male, Crossover AFDF patron)*
  - Although, some expect that particular kinds of events are better-suited to providing certain benefits
    - *“The ballet: I see that as beautiful controlled motion, which is usually accompanied by great music and the thing about it that I find most exciting is the fantastic athleticism of the participants.” (Male, Crossover AFDF patron)*

## enrichment

- Consumers want to walk away from an arts experience feeling that their lives are richer for it
  - They want to learn something new or be exposed to something they don’t normally come across
  - They want to build memories

## enjoyment

- They want to go into an experience knowing that they’ll have a good time
  - They want to leave happy and smiling – or at least fully satisfied with what they’ve seen

## inspiration

- They want to appreciate the extraordinary talent of the artists and performers, and they want to use the experience to help them tap into their own creativity

## relaxation

- They want a reprieve or escape from their daily lives

## Cultural Decision Making: Lighter consumers are generally more selective about what they attend in the first place

- Because arts and cultural activities aren't a top priority to lighter cultural consumers in general, they tend to seek out something they are familiar with
  - They need to expect that an event will be really enjoyable for it to be a worthwhile venture
    - *"I have to choose maybe three or four things the whole year that I would go to so it has to be selective."* (Male, Single organization AFDF patron)
  - They often default to events or organizations that they've attended in the past
    - *"I look forward every year to the Flower Market and I go like clockwork because I know exactly what it is and it's a no-brainer. I don't have to think about it. But I don't seek out art museums."* (Female, Non-AFDF patron)
    - This can also mean attending in conjunction with an annual occasion, like Christmas or a big family gathering
      - > *"Mostly I love Longwood at Christmas and I like Hagley at Christmas, the way they decorate is just beautiful"* (Female, Non-AFDF patron)
  - Big name acts are an important draw for the same reason – the familiarity of a big-name act "guarantees" enjoyment
    - *"We went to see Fleetwood Mac up in Philly and they played for almost three hours and they were phenomenal. We paid \$185 a ticket but it was fantastic, we were satisfied."* (Female, Non-AFDF patron)
    - *"I think Wilmington would do itself a service if they had a big concert venue that attracted big names, not just people who come through the Opera House."* (Female, Non-AFDF patron)
    - *"Recognize what it is that attracts people to venues in other cities and draw off of that. Local artists may or may not do that, but big-time artists like you had mentioned before that could be pulled into this city could draw a lot of people; they draw a lot of people in Philadelphia, why wouldn't they draw them in Wilmington? Most of Wilmington goes to Philadelphia to see that because it's not offered in Wilmington right now."* (Male, Non-AFDF patron)
- This inclination toward the familiar doesn't preclude a desire for something new, however
  - They want newness and novelty, but they want it with the guarantee that a familiar name or institution can provide
    - *"Well once you've been to the museums and once you've been to the historical houses, or you've been to the...it's kind of like – what's new?"* (Female, Single organization AFDF patron)

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## Cultural Decision Making: Consumers' set of information sources is relatively small

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- The primary information sources that consumers mentioned include:
  - Direct mailings (and other forms of outreach) from the organizations that they are currently attend or are engaged with
  - 55 Hours (*The News Journal's* Friday entertainment supplement)
- But, most feel that these sources have limitations
  - They are not getting much in the way of direct outreach from organizations that they are not already attending, so their exposure to the breadth and variety of Wilmington's cultural landscape is limited
    - *"Once you participate you get information."* (Male, Crossover AFDF patron)
    - *"It seems to me if I subscribe to the Delaware Theater I know everything's that's going on there because I get a ton of mailings. I get mailings from the symphony because I'm going. I used to belong to the Delaware Art Museum. I used to get their mailings but because I no longer belong I don't get anything. I couldn't tell you what's going on at the Delaware Art Museum."* (Female, Crossover AFDF patron)
  - The last-minute nature of 55 Hours prevents advance planning
    - *"There's nothing worse than waking up on a Saturday morning, getting up and just doing some errands and stuff then coming home and reading the Saturday paper at 7 o'clock or 8 o'clock at night, you're laying on the sofa and you see – oh my gosh, I could have gone to this."* (Female, Crossover AFDF patron)

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## Cultural Decision Making: Last-minute listings are particularly ineffective for lighter cultural consumers

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- They tend to plan their attendance decisions far in advance ...
  - Attending on special occasions (holidays, birthdays) or for marquee events allows them this opportunity to plan well ahead of time
- ... or they choose forms of participation that have no set schedule, and so require minimal pre-planning
  - Historic homes and gardens are easy forms of participation on this dimension
- As a result, last-minute listings for events that have a specific schedule are not well-matched to their decision dynamics
  - Friday listings reach them too late for them to be able to plan in a theater performance or specific event at a museum
    - *“For us going to an art event, going to the theater, going to the museum has to be planned ahead of time. We have to plan those days ahead of time in order to get to do these things. So to know about them ahead of time is the most important thing for us.” (Male, Single organization AFDF patron)*

## Cultural Decision Making: All told, most consumers feel that they are simply not getting enough information

- The information sources that are out there do not necessarily reach a wide audience
  - For instance, 55 Hours is available primarily to *News Journal* subscribers
    - “If you don’t buy *Wilmington News Journal*, you’re not necessarily going to know what’s going on.” (Female, Heavy cultural consumer AFDF patron)
  - And, organizations are not using advertising effectively to reach out to a broad audience of potential patrons who are not currently attending
    - “Sometimes there are acts that come that I never even know about it, just because of lack of advertising” (Female, Crossover AFDF patron)
    - “I don’t hear it on the radio being advertised, I don’t see it on TV being promoted and so I’m not out looking for it and it’s not looking for me, it’s not jumping out at me anywhere. I guess if it was in front of me more often I might think about going.” (Male, Non-AFDF patron)
- Most recognize that there is information out there, but that getting to it requires work on their part
  - And, they are not very inclined to do the work necessary to seek information out
    - “I think that’s a problem with the arts in this area – you have to go to it. With my family we had to find the museum, we had to find the events, we didn’t know these things were out there so we had to go and look for it.” (Male, Single organization AFDF patron)
    - “There are plenty of avenues to find it but if you’re not someone who’s willing to go out there and do it or has the time .” (Female, Single organization AFDF patron)
    - “I don’t get the newspaper so unless I really want to seek it out, I don’t know about it.” (Female, Single organization AFDF patron)

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## Cultural Decision Making: Information barriers affect residents of different regions in different ways

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- Residents of all areas want more information, but their particular needs differ depending on where they live
  - Wilmington’s unique geographic location – near multiple major metropolitan areas – means that Wilmington is competing for mindshare with many different sources of information about many different events
    - And, as the smallest city with the fewest media resources, it is difficult for Wilmington to be the loudest voice
      - > *“Wilmington is sort of unique because there’s a lot between New Jersey, Pennsylvania – we really don’t have much of a media, I think it’s the only state that doesn’t have its own commercial TV station. We have one newspaper so it’s very difficult to get the word out about what we do have in Wilmington.” (Male, Heavy cultural consumer AFDF patron)*
  - In particular, southern Pennsylvania residents need information to come from some source *other than* the local Wilmington paper because it doesn’t reach them
    - *“I don’t read the Wilmington paper anymore because we’re in Pennsylvania they won’t deliver it.” (Male, Crossover AFDF patron)*
    - *“I’m right over the state line – if you don’t buy Wilmington News Journal, you’re not necessarily going to know what’s going on.” (Female, Heavy cultural consumer AFDF patron)*
- Few of the non-New Castle County residents we talked to were actively keeping up with Wilmington-area events
  - The exceptions were those who used to live in Wilmington
  - But the onus is completely on them to seek it information about Wilmington events, because it is not coming to them
    - And, this is even more challenging if they live over the Pennsylvania border and can’t get the *Wilmington News Journal*

## Cultural Decision Making: Cost affects the decision making process differently for lighter versus heavier consumers

- For lighter consumers, spending on arts and culture is a discretionary expense that is easily eliminated when budgets are tight
  - Concentrating their arts and culture spending on special occasions is a strategy for dealing with this budgetary constraint
    - *“That’s maybe why we only go to Longwood at Christmas because it’s a special occasion or whatever. I’m not going to go on a random Tuesday to Longwood to walk around and see azaleas for \$20, I mean I’m just not, I’m being honest. I’m just not going to spend the money.” (Female, Non-AFDF patron)*
  - Because of the recession, they feel the need to cut back right now
    - *“No, we’re not going to the arts as often as we want to, and for us personally it’s just the cost factor. We’re in a tough spot and work’s slow and my wife’s salary is going down.” (Male, Single organization AFDF patron)*
    - *“Cost is a big thing to me too.... Some of these places are out of my spending realm right now.” (Female, Non-AFDF patron)*
- But for heavier consumers, the relative affordability of Wilmington’s arts scene is a big draw
  - They view Wilmington as a cheaper – but still high-quality – alternative to Philadelphia or New York
    - *“It’s more expensive in Philadelphia. It’s a lot of money to park and your ticket is more expensive. There are shows that leave here and go to Philadelphia, the same show is more money in Philadelphia.” (Female, Heavy cultural consumer AFDF patron)*
    - *“First of all, it’s a lot cheaper [in Wilmington] – where else can you go to a show that doesn’t cost you to park and you’re home in 10 minutes? If you go to New York you can forget about that.” (Male, Crossover AFDF patron)*
  - They will budget in arts and culture even in the face of difficult financial times
    - Wilmington’s accessible prices – and the quality that comes with them – are an even bigger competitive advantage for Wilmington in tough economic times

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## Cultural Decision Making: Consumers' attitudes toward downtown Wilmington enter into their cultural decisions

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- The near-absence of restaurants, bars, and other nightlife amenities puts a damper on consumers' excitement about attending an arts event in downtown Wilmington
  - For lighter cultural consumers, who tend to make a special occasion out of attending the arts, downtown Wilmington's lack of amenities is particularly disappointing
    - There are times that they want to plan an evening around dinner and an arts event, but have trouble finding a restaurant near the event or an event near the restaurant they want to attend
- The perception that downtown Wilmington (and the Riverfront area) is dangerous or difficult to navigate can be a barrier to cultural participation
  - This is particularly true for those from downstate Delaware and lighter cultural consumers in general
  - Even if an event interests them, the perceived hassle and risk associated with getting around in Wilmington discourages participation
    - *"My husband and I will often discuss something that we've attended and [say] you should come with us the next time...and they look at us like we're wearing two heads. They would never go downtown. So I think the very first issue is safety. Got to at least create a perception – if not the reality – that it's safe to go downtown. We go, it doesn't bother me, it doesn't bother me to go to the Riverfront, I think it's perfectly safe. But you cannot convince someone that's decided that it isn't."* (Female, Heavy cultural consumer AFDF patron)
    - *"There's times – even with the Italian Festival – that I would go but I don't even feel like finding a spot, I don't feel like navigating through the streets to park. The things that are in Wilmington are hard to get to or tricky or dangerous."* (Female, Non-AFDF patron)

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## Key Findings: **Increasing Audience Engagement & Attendance**

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- **Tactics testing**
- Message testing

# Tactics Testing: The specific tactics that consumers find desirable fall into three broad categories

## opportunities to try new organizations

- Arts “passport” (a multiple organization “subscription” providing discounts, information, and access to arts events and performances)
  - This was the overwhelming favorite, with 15 participants saying it was the tactic they found most appealing and several more placing it in their top three
- Wilmington arts festival
  - 1 participant found this most appealing, with several more placing it in their top three

## more information

- Website with centralized arts listings for the Wilmington area
  - 5 participants found this most appealing
- Shared mailing lists
  - This was not formally tested in the groups, but emerged as a desirable tactic naturally among respondents

## richer experiences

- All-inclusive ticket packages (includes dinner, transportation/parking, and hotels)
  - 4 participants found this most appealing
- Behind-the-scenes access (tours, lectures, and other opportunities to see arts organizations and the artistic process at work)
  - 3 participants found this most appealing
- Social events before or after a performance (pre-performance cocktail hour or performance after-party)
  - 2 participants found this most appealing

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## Tactics Testing: Consumers place low priority on logistical offerings

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- Tactics that mitigate some of the convenience/logistical barriers associated with attending cultural events did not spark much interest
  - Central ticket-buying kiosk
  - Open seating (seats are not reserved, you can choose your own)
  - On-site child care at arts events
  - Shuttle service between Wilmington arts organizations & public transportation (such as Amtrak)
  - Valet parking
  - Print-at-home tickets
  
- Participants also showed lukewarm interest in some other tactics for providing a richer cultural experience:
  - Unified programming themes shared by multiple organizations (many organizations programming performance/events with a common theme)
    - 1 participant found this most appealing, but few others named it among their top three
  - Social event series (series of singles' nights or wine tastings held in conjunction with cultural events)
    - A handful named this among their top three, but nobody found it to be the most appealing tactic

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## Key Findings: Increasing Audience Engagement & Attendance

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Tactics testing

 **Message testing**

# Message Testing: Consumers respond well to messages that incorporate four key elements about Wilmington arts

## quality

- Wilmington offers high-quality arts experiences – both in the absolute, and relative to what some might expect given its size
  - Breadth of experiences is included in their understanding of “quality”
- Phrases that resonated with participants include:
  - “great arts”
  - “big-city quality”
  - “world class”
  - “a world of variety”

## intimacy

- Wilmington’s arts offer an intimate, small-scale, and comfortable experience
- Phrases that resonated with participants include:
  - “right at your fingertips”
  - “local scene”

## convenience

- Wilmington’s arts are easy to get to in a way that mirrors Wilmington’s easy-going way of life
- Phrases that resonated with participants include:
  - “small-town convenience”
  - “right here”
  - “minutes from home and work”

## affordability

- Wilmington’s arts offer high-quality experiences at relatively low prices
- Phrases that resonated with participants include:
  - “without breaking your bank”
  - “affordable”

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## Message Testing: Phrases that seem out-of-line with the current Wilmington arts brand were disliked

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- Participants were turned off by two phrases that they felt were not representative of the current Wilmington cultural landscape
  - “Not a secret anymore”
    - Many felt that this was not an accurate description of the current scene because of the perceived information vacuum about cultural events
      - > *“Wilmington art, not a secret anymore’ ... I don’t think it’s appropriate. We just sat here and said how we’re still trying to find more ways to get information.” (Female, Crossover AFDF patron)*
      - > *“I absolutely feel it is a secret; if you don’t know what to look for you’re not going to find it.” (Female, Single AFDF patron)*
    - But, many thought that this would be a good goal for the Wilmington arts to aspire to
      - > *“I’d love to see in the future: ‘it’s not a secret anymore’.” (Female, Heavy cultural consumer AFDF patron)*
      - > *“We’re trying hard to present to the general public what’s here, what treasures we have in the state of Delaware and city of Wilmington that would surprise you if you knew what we had.” (Male, Heavy cultural consumer AFDF patron)*
  - “Blow your mind”
    - This phrase rang false to many participants given the relatively conservative nature of Wilmington’s offerings
      - > *“I wouldn’t relate [what’s] around here to anything that would blow your mind.” (Male, Single AFDF patron)*
    - Further, few thought that it would be desirable for Wilmington to offer mind-blowing arts experiences
      - > *“That could almost turn me off.” (Male, Single AFDF patron)*

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# Recommendations

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## Recommendations: Overview

- This phase of research identified three broad strategies that Wilmington arts organizations can employ to foster and bolster the arts-going audience in Wilmington
  - Each of which can encompass a number of specific tactics, spanning marketing, programming, and communications



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## Recommendations: Overview (cont.)

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- Each of these recommended strategies can be employed on two levels:
  - by individual institutions, guided and driven by their own goals and personalities
  - by a collaboration of organizations banding together to collectively implement these strategies for a wider-scale impact
- While each of these *can* be implemented by individual organizations, collaboration will be a necessary ingredient to maximize the effectiveness of these strategies for any Wilmington arts organizations, as well as the arts scene as a whole
  - As noted previously, arts patrons themselves – particularly the heavier cultural consumers – appreciate that the Wilmington cultural landscape is facing collective problems that will best be addressed by a collaboration, rather than by every organization working toward its own agenda
- These recommendations feed into the final strategic recommendations which we will present next

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## Recommendation #1: Minimize the information barrier

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- Nearly all of these arts-goers expressed a desire for more – and more clearly, cohesively organized – information on arts offerings in the Wilmington area
  - This was even shared by heavy arts patrons who know where to gather information if they want to find it
  - Consumers tend to talk about this barrier in terms of there being “too little” information
    - They say that they don’t see advertising or hear about events that are of interest to them
  - But, this perceived lack of information may actually suggest that information comes from *too many* different sources for consumers to be able to easily wade through them and find the information that they want
    - Participants mentioned a wide variety of information sources that are out there – mailings from individual organizations, 55 Hours, the tourism website, etc. – but they haven’t made a habit out of any of them
  - Furthermore, they feel that the information isn’t coming to them; they have to seek it out
    - Which is even more difficult when there is no single, trusted source providing the information they want
- This presents a natural opportunity for collaboration between organizations
  - Maximizing the effectiveness of the information that is already out there as well as making an efficient use of resources for mutual benefit
    - Many respondents explicitly acknowledged that organizations should work together to provide them with the information that they want

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## Recommendation #2: Provide opportunities and incentives to sample more of what Wilmington arts has to offer

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- The arts audiences in Wilmington can feel that trying something new – an unfamiliar organization or an unknown artist or act – is a risky proposition
  - They prefer to go into an experience knowing that they will enjoy it
- This is most true for lighter cultural consumers ...
  - They allocate less time and fewer financial resources to cultural experiences, so they don't want to "use up" one of their outings on an experience that doesn't guarantee enjoyment
  - As a result, they default to familiar experiences (e.g. Longwood Gardens at Christmastime) or big-name acts
- ... but is nevertheless relevant for heavier cultural consumers, too
  - They're pretty comfortable with the conservative nature of the Wilmington arts scene, and so many not be very likely to sample riskier, more cutting-edge works from unknown artists
- Making it easy for audiences to attend multiple organizations and reducing the perceived risks of sampling a new organization or new work can help to maximize crossover attendance between Wilmington's organizations

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## Recommendation #3: Upgrade the experience by providing enhancements to the visit

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- One of the major shortcomings of Wilmington's arts scene is the lack of downtown nightlife to engage in before or after an event
  - This can leave cultural consumers feeling that they can't make a full evening out of a cultural event
  - And, they don't think that organizations are currently offering enough in the way of enhancements to the performance or event to mitigate this shortcoming
- Providing "add-ons" that come before or after a performance or event can directly address this lacking and can enrich the overall experience
  - However, AFDF organizations should keep in mind that cost may be a factor, particularly for lighter cultural consumers
  - They don't want to feel that they have to pay more in order to have a full experience

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# Appendix

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Screeener

Discussion Guide

Focus Group Screener

Name: _____		
Street Address: _____		
E-Mail Address: _____		
City: _____	State: _____	Zip: _____
Home Phone: _____		Office Phone: _____
List? ( ) Facility		
( ) Client	<b>(only one call per household)</b>	
Confirmed to attend?	YES	Date: _____
Reminder phone call made?	YES	Date: _____

**Group 1: Cross-over AFDF Patrons**

This group will provide insight into the attitudes, behaviors, and need of those currently attending multiple AFDF organizations. It will consist of individuals who are current or very recent patrons of multiple AFDF organizations, and meet a minimum threshold of cultural activity overall.

- Has attended or visited a minimum of 2 of the 5 AFDF organizations since Fall 2007
  - Seek a few individuals who have attended or visited a minimum of 3 of the 5 AFDF organizations since Fall 2007
- A minimum of 2-3 patrons from each of the 5 organizations
- Has attended or visited a minimum of 3 cultural organizations since Fall 2007
  - Seek a mix of organizations
- Mix of subscribers and single ticket buyers

**Group 2: Single Organization AFDF Patrons**

This group will provide insight into the attitudes, behaviors, and need of those currently attending only one AFDF organization. It will consist of individuals who are current or very recent patrons of a single AFDF organization, and meet a minimum threshold of cultural activity overall.

- Has attended or visited 1 (and only 1) of the 5 AFDF organizations since Fall 2007
  - Has not attended or visited any other AFDF organizations in the last 5 years
  - A maximum of 5-6 individuals who have attended or visited any other AFDF organizations ever
- A minimum of 2 patrons from each of the 5 organizations
- Has attended or visited a minimum of 3 cultural organizations since Fall 2007
  - Seek a mix of organizations

## Focus Group Screener

- Mix of subscribers and single ticket buyers

### **Group 3: Heavy Cultural Consumers, AFDF Patrons**

This group will provide insight into the attitudes, behaviors, and need of AFDF patrons with very high levels of cultural activity overall. It will consist of individuals who are current or very recent patrons of at least one AFDF organization, and meet a relatively high threshold of cultural activity overall. This group may consist of both cross-over AFDF patrons and single organization AFDF patrons.

- Has attended or visited a minimum of 1 of the AFDF organization since Fall 2007
- A minimum of 2 patrons from each of the 5 organizations
- Has attended or visited a minimum of 5 cultural organizations since Fall 2007
  - A minimum of 3 cultural organizations (including AFDF organizations) must be in the Wilmington area

### **Group 4: Non-Patron Cultural Consumers**

This group will provide insight into the attitudes, behaviors, and need of cultural consumers who are not currently attending AFDF organizations. It will consist of individuals who are not recent patrons of any AFDF organization, and meet a minimum threshold of cultural activity overall.

- Has attended or visited none of the AFDF organization in the last 5 years
  - A maximum of 5-6 individuals who have ever attended or visited any AFDF organization
- Has attended or visited a minimum of 3 cultural organizations since Fall 2007
  - A mix of organizations in the Wilmington area and those elsewhere
  - A maximum of 2-3 individuals who have not attended a Wilmington area organization

### **Specifications**

- Recruit 10 for 8-9 to show
- Demographics:
  - Mix of gender (a minimum of 3 of each gender per group)
  - Aim for 2-3 non-Caucasians in each group
  - Mix of ages brackets, with no more than 2-3 people over 65 y/o
  - Mix of household income levels
  - Mix of employment (maximum 2 retirees per group)
- Geography:
  - Minimum of 3 per group from New Castle County, DE
    - Minimum of 1 per group from the City of Wilmington
  - Minimum of 3 per groups from Chester County or Delaware County, PA

Focus Group Screener

- For Groups 1 & 2: Minimum of 2 per group from other counties in Delaware (non-New Castle)
- For Groups 3 & 4: Seek a minimum of 2 across both groups from other counties in Delaware (non-New Castle)

**ASK TO SPEAK TO EITHER SPOUSE LISTED**

**RECRUITER: RECORD WHICH LIST BEING USED FOR RECRUIT**

- Cross-over Patrons
- Single Organization Patrons
- Facility List

Hello, my name is \_\_\_\_\_ with \_\_\_\_\_. We are conducting research on behalf of a consortium of cultural organizations in Wilmington. Please be assured that this is not a sales or fundraising call. This conversation may lead to an invitation to participate in a group discussion. As a way of expressing our appreciation, we would like to offer you \$75 for your time if you agree to participate in a 2 hour group discussion.

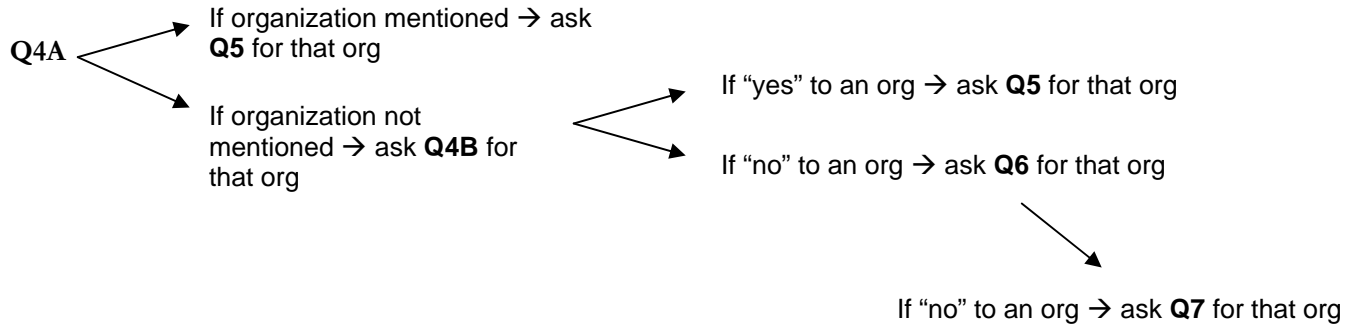
Do you mind if I ask you some questions?

1. Have you participated in any focus groups in the past 12 months?
  - Yes **TERMINATE**
  - No **CONTINUE**
  - I don't remember **TERMINATE**
  
2. Are you, your spouse or members of your family employed at any of the following types of organizations or professions? [CHECK IF "YES"]
  - Advertising, sales promotion or public relations **TERMINATE**
  - Marketing research **TERMINATE**
  - Magazine, newspaper, radio or television **TERMINATE**
  - A non-profit organization – what role and which organization? \_\_\_\_\_  
**HOLD AND ASK SLOVER LINETT**
  
3. Are you, your spouse or members of your family a board member or volunteer at a non-profit organization?
  - Yes – what role and which organization? \_\_\_\_\_  
**HOLD AND ASK SLOVER LINETT**
  - No **CONTINUE**

Focus Group Screener

**RECRUITER, FOR QUESTION 4A, PLEASE READ THE FOLLOWING QUESTION TEXT, AND MARK RESPONSES IN THE GRID THAT FOLLOWS.**

**FOR THE BOLDED ORGANIZATIONS ONLY, PLEASE ASK QUESTIONS 4B THROUGH 7, IN THE FOLLOWING ORDER, MARKING RESPONSES IN THE GRID THAT FOLLOWS.**



4A. What arts and cultural organizations have you attended or visited since the Fall of 2007? [DO NOT READ LIST]

4B. [ONLY READ BOLDED ORGANIZATIONS NOT OFFERED IN 4A] Have you attended or visited \_\_\_\_\_ at all since the Fall of 2007?

**FOR BOLDED ORGANIZATIONS**

**Group 1: Must mention in Q4A or answer "Yes" in Q4B for a minimum of 2 organizations.**

**Group 2: Must mention in Q4A or answer "Yes" in Q4B for only 1 organization.**

**Group 3: Must mention in Q4A or answer "Yes" in Q4B for a minimum of 1 organization.**

**Group 4: Must answer "No" in Q4B for all 5 organizations.**

**FOR OTHER ORGANIZATIONS**

**Group 1: Must mention a minimum of 1 organization. Seek a mix of organizations.**

**Group 2: Must mention a minimum of 1 organization. Seek a mix of organizations.**

**Group 3: Must mention a minimum 5 organizations TOTAL (including bolded organizations). Seek a minimum of 3 organizations (including bolded organizations) on the list included in the grid below.**

**Group 4: Must mention a minimum of 3 organizations. Seek a mix of organizations. In all Groups, if "Other" response is used to qualify individual, please hold and ask Slover Linett.**

5. [ONLY FOR BOLDED ORGANIZATIONS MENTIONED IN 4A OR IF ANSWERED "YES" IN 4B] Are you currently a subscriber a member of \_\_\_\_\_?
- Yes
  - No, but I have been in the past
  - No, I have never been

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Focus Group Screener

**Groups 1-3: Seek mix**

6. [ONLY FOR BOLDED ORGANIZATIONS NOT ATTENDED SINCE FALL OF 2007] Have you attended or visited \_\_\_\_\_ at all in the last 5 years?

**Group 2: Must answer "No" for all 4 organizations not attended since Fall of 2007.**

**Group 4: Must answer "No" for all 5 organizations not attended since Fall of 2007.**

7. [ONLY FOR BOLDED ORGANIZATION NOT ATTENDED IN LAST 5 YEARS] Have you ever attended or visited \_\_\_\_\_?

**Groups 2 & 4: Recruit no more than 5-6 individuals (per group) who answer "Yes" for any organization.**

Focus Group Screener

	Q4A. Attendance since 2007 (Unaided)	Q4B. Attendance since 2007 (Aided)	Q5. Subscriber/Member	Q6. Attendance in last 5 years	Q7. Attendance ever
<b>Delaware Art Museum</b>					
<b>Delaware Symphony Orchestra</b>					
<b>OperaDelaware</b>					
<b>The Grand Opera House</b> <i>(other than for the Delaware Symphony Orchestra or OperaDelaware)</i>					
<b>Delaware Theatre Company</b>					
Christiana Cultural Arts Center					
Delaware Center for the Contemporary Arts					
Delaware Museum of Natural History					
DuPont Theatre					
First State Ballet Theatre					
Hagley Museum					
Longwood Gardens					
Winterthur Museum & Country Estate					
Other (RECORD)					
Other (RECORD)					
Other (RECORD)					
Other (RECORD)					
Other (RECORD)					

Focus Group Screener

8. If you don't mind, I'd like to ask how old you are. [RECORD]: \_\_\_\_\_

[CHECK OFF AGE CATEGORY BELOW]

- Below 25 years } **TERMINATE**
- 25 to 34 years }
- 35 to 44 years }
- 45 to 54 years } **AIM FOR 2-3 PER GROUP**
- 55 to 64 years }
- 65 to 74 years }
- 75 years and older } **TERMINATE**

9. What county do you live in?

- New Castle County, Delaware } **AIM FOR 3 PER GROUP**
- Chester County, Pennsylvania }
- Delaware County, Pennsylvania } **AIM FOR 3 PER GROUP**
- Sussex County, Delaware } **GROUPS 1 & 2: MIN OF 2 PER GROUP**
- Kent County, Delaware } **GROUPS 3 & 4: SEEK 2 ACROSS BOTH GROUPS**
- Other \_\_\_\_\_

9b. [IF ANSWERED "NEW CASTLE COUNTY"] What city do you live in?

- Wilmington } **AIM FOR 1 PER GROUP**
- Other \_\_\_\_\_

10. Are you currently: [READ LIST]

- Employed full-time [SPECIFY JOB] \_\_\_\_\_
- Employed part-time [SPECIFY JOB] \_\_\_\_\_
- Full-time caregiver
- Retired } **MAX 2 PER GROUP**
- Student } **MAX 1 PER GROUP**
- Unemployed
- Other (What do you currently do? \_\_\_\_\_)

11. [RECORD GENDER, DON'T ASK]

- Male } **MINIMUM OF 3 PER GROUP**
- Female } **MINIMUM OF 3 PER GROUP**

12. Do you have any children under 18 years old living at home with you?

- Yes } **MINIMUM OF 3 PER GROUP**
- No } **MINIMUM OF 3 PER GROUP**

13. What is the highest level of education that you've completed?

- High School/GED or less
- College degree (BA/BS)
- Graduate or Postgraduate degree

**Seek mix**

14. For statistical purposes only, into which of the following categories does your total annual household income fall? [READ LIST]

- Less than \$25,000
- More than \$25,000 but less than \$50,000 } **TERMINATE**

Focus Group Screener

- ( ) More than \$50,000 but less than \$75,000
  - ( ) More than \$75,000 but less than \$100,000
  - ( ) More than \$100,000 but less than \$150,000
  - ( ) More than \$150,000 but less than \$200,000
  - ( ) More than \$200,000
- SEEK A MIX OF HH INCOME**

15. Do you consider yourself to be...?

- ( ) Caucasian/White
- ( ) African American/Black
- ( ) Latino/Hispanic
- ( ) Asian
- ( ) Other \_\_\_\_\_

**SEEK 2 NON-CAUCASIANS PER GROUP**

**Check off group:**

- Group 1: Cross-Over Patrons (Tuesday, May 19, 5:30-7:30pm)
- Group 2: Single Organization Patrons (Tuesday, May 19, 8:00-10:00pm)
- Group 3: Heavy Cultural Consumers (Wednesday, May 20, 5:30-7:30pm)
- Group 4: Non-Patrons (Wednesday, May 20, 8:00-10:00pm)

**IF RESPONDENT QUALIFIES:**

Thank you for answering these questions for me. As I mentioned, we're holding a two-hour discussion group on \_\_[insert date]\_\_ at \_\_[insert location]\_\_. The group will start at \_\_[insert time]\_\_ and end at \_\_[insert time]\_\_, and we will provide light refreshments and beverages for the group. [GIVE FURTHER ROOM LOCATION DETAILS IF NECESSARY]

As I mentioned, you'll receive \$75 by participating in the discussion.

Are you able to participate in our study?

- ( ) Yes
- ( ) No

We have limited our invitations to a select group of individuals. Therefore, if for any reason you are unable to attend, please contact me immediately at \_\_\_\_\_ so we can find a replacement. Please do not send anyone in your place.

## Focus Group Discussion Guide

### 1. Introductions (10 mins.)

- Interviewer role (independent researcher, guidelines, disclosures)
- Roundtable introductions: name, what you do for work, where you live
- When you have out-of-town guests, what do you like to show them?
  - *Listen for Wilmington vs. Philadelphia attractions and AFDF organizations, but don't probe*

### 2. Cultural Activity and Decision-Making (20 mins.)

- Tonight, we'll be discussing arts and entertainment, and what you look for when participating in an arts-related activity.
- What types of arts and entertainment activities do you enjoy participating in? What do you enjoy about these activities?
  - *Note: Throughout, moderator will steer respondents away from non-arts-related forms of entertainment (e.g. sports, amusement parks, etc.)*
  - *Listen for attending performing arts/museums versus other forms of participation*
  - *Probe on differences in benefits of participation for attending performing arts/museums versus other forms of participation*
- What are some of the arts attractions in the region that you've visited in the past year or two? *[List on easel]*
  - Which of these is your favorite? *[Star on easel]*
    - What makes it your favorite?
    - *Probe on positive experiences and perceptions*
- Why do you attend these particular organizations? What is it about them that makes you go to these rather than other organizations?
  - *Moderator will listen for and probe on: price, location/convenience, social context, family-friendliness, reputation, past experience*
  - *Probe on different decision-making criteria for Wilmington vs. Philadelphia vs. other locations*
- Are you attending/visiting arts attractions as often as you would like to be? If not, why not? What are some of the things that prevent you from attending more often?
  - Are there particular "turn-offs" about the organizations that you aren't attending?
  - *Moderator will listen for and probe on: price, location/convenience, programming, quality, social context, information*
- What do you personally get out of participating in arts-related activities? What are the benefits that you get from the arts?
  - *Listen for social benefits, self-discovery, learning*
  - *[Hand out blank index cards] I'd like you to write the [3-5] most important things (one on each card) that you personally get out of participating in arts activities.*
    - *Go around room and share.*
    - *Why are these important to you?*
    - *Do you get different things out of different activities?*
      - *Probe on differences in benefits of participation for attending performing arts, museums, etc. versus other forms of participation*

- How do you determine whether or not certain arts/cultural activities will give you those things/benefits?
- In an ideal world, how would you get those things (benefits) out of participating in the arts?
  - *Probe:* How could the arts provide those benefits to you? What would the experience do or be in order for you to get those things out of it?

### **3. Perceptions of Wilmington and AFDF Organizations (25 mins.)**

- We're going to do an exercise that's going to require your imagination and creativity. I'd like you to think about Wilmington's arts scene, and select 2-3 pictures [from an eclectic deck of images] that remind you of or that you associate with Wilmington's cultural life.
  - Why did you pick the images that you did?
  - *Probes:*
    - *Are these positive or negative associations? Why?*
    - *Are your perceptions based on a specific experience (or experiences) with a Wilmington cultural organization? Or are they based on your general experience with Wilmington?*
    - *Would you have picked different images if you were thinking about some other aspect of Wilmington? (e.g. Wilmington's social life)*
    - *Can you think of specific organizations that embody or contribute to your perceptions? Are there any specific organizations that are exceptions to this perception?*
  - *Throughout, moderator will listen for mentions of the 5 AFDF organizations, and probe on specific perceptions of those organizations.*
- *Repeat picture sort for Philadelphia's arts scene*
  - *Additional Probes:*
    - *What's the same/different between the images you selected for Wilmington vs. Philadelphia?*
    - *What does Wilmington's arts scene offer that Philadelphia's doesn't – and vice versa?*

### **4. Strategy Brainstorming & Input (25 mins.)**

- I'd like you to look back to the 5 things that you personally get out of participating in arts/cultural activities (that you wrote down on index cards).
- How well is Wilmington's arts scene doing in providing these to you? Are there particular things that it does well? Particular things that you don't get at all from what Wilmington has to offer?
  - How could Wilmington's arts scene be providing these better? Are there specific improvements or changes that you would make so that you could be getting these from Wilmington's arts scene?
  - *Listen for and probe on: programming themes, more convenient transportation and parking, offering a more holistic cultural experience, providing more back-stage access, more social opportunities, more family-friendly programming*
- Are the organizations that you currently attend [refer back to list on easel from Section 2] that are already providing these?

- *For AFDF organizations in particular, probe on what specific aspects of the experience provide benefits.*
- How could these organizations be providing these better?
- *Listen for and probe on: programming themes, more convenient transportation and parking, offering a more holistic cultural experience, providing more backstage access, more social opportunities, more family-friendly programming*
- When you think about an organization [*moderator may use a specific organization as an example*] that you are not currently attending, is it because you feel that you can't get these things out of the experience that that particular organization provides? Are there other reasons that you don't attend a particular organization?

## 5. **Message Testing** **(25 mins.)**

- I am going to hand out a set of [4-6] cards, each with a different statement about Wilmington's arts scene.
  - *There are ten messages, each written on an index card for sorting and discussion.*
    - a) ***Wilmington arts: Not a secret anymore.***
    - b) ***Great arts, right here.***
    - c) ***In Wilmington, the arts are more than a performance or exhibit—the experience includes a social element before or after. It's like a party with friends.***
    - d) ***In Wilmington the arts are a two-way street, where the audience gets involved and has a voice.***
    - e) ***Many views. One picture.***  
***Wilmington arts collaborating annually around a shared theme.***
    - f) ***Wilmington arts: Local scene. Global vision.***
    - g) ***Wilmington: A world of variety, right at your fingertips.***
    - h) ***Big-city quality. Small-town convenience.***
    - i) ***Blow your mind without breaking your bank.***
    - j) ***In Wilmington, the arts are more than a performance or exhibit—they bring you behind the scenes.***
    - k) ***Wilmington arts: world class, affordable, minutes from home and work.***
  - *The goal of this section will be to share with respondents a few statements that speak to a few possible messaging strategies for the AFDF team. The intention isn't to create a definitive joint messaging strategy or language from this exercise (at least without further discussion/decision), though it will help us gain direction on which elements of collaborative messaging strategies would be most effective/appealing for patrons.*
- Which of these is most appealing to you personally?
  - Why? What do you like about this statement?
- Which would encourage you to attend the arts more frequently and/or more actively? Why?
- Which would it encourage you to try out some of the cultural organizations that you are not currently attending?
  - [*For non-Wilmington residents*] Would this make attending the arts in Wilmington more appealing?

- What about the other statements? What didn't you like about them? Why?

**6. Tactics Testing (10 mins.)**

- *Hand out list of strategies/tactics [note: list provided to participants may include short, descriptive text for each item]*
  - *Wilmington arts festival*
  - *Arts "passport" (discounts, information, and access to Wilmington arts)*
  - *Behind-the-scenes access to arts organizations (including tours)*
  - *Centralized arts listing, website, or brochure*
  - *Central ticket-buying kiosk*
  - *Packages with hotels and restaurants (for discounted rates and central reservations)*
  - *Open seating*
  - *Child care on-site at arts events*
  - *Pre-show cocktail hour or after-party at arts events*
  - *Shuttle service around Wilmington arts organizations*
  - *Valet parking*
  - *Unified programming themes shared by multiple arts organizations*
  - *Social event series in conjunction with cultural events (singles' night, wine tasting, etc.)*
  - *Print-at-home tickets*
- This sheet lists some things that some area cultural organizations are thinking about doing/offering. I'd like you to take minute to look at this list and rank your top three favorites.
- *For each, ask:*
  - What do you like about this idea? What do you dislike?
  - Would this make attending these organizations more desirable? Why or why not?
    - *Probe on whether it would encourage them to attend same organizations more often or encourage them to try out new organizations/art forms*
    - *Moderator will probe on specific AFDF organizations that participants are not currently attending, and whether these offerings would make those organizations more appealing*

**7. Closing (5 mins.)**

- What would make you try out a cultural organization that you are not currently attending?
  - *Probe on AFDF organizations specifically*
- What could make Wilmington more attractive as an arts destination?